

28 July 1970

MEMORANDUM FOR THE RECORD

SUBJECT: Advance Transportation Expenses for Shipment of the Effects
of FS Retirees

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1. At my request, [REDACTED] Office of Finance, called Mr. Bernstein on 21 July 1970 concerning State Department's authority to authorize payment of transportation expenses to a FS retiree following an official determination of the date of his retirement but prior to the time the retirement occurs.

2. Mr. Bernstein quoted FAM 168.1, Advance Shipment of Effects, as the Department's authority for allowing the advance shipment of goods. While it primarily relates to the advance return of dependents in PCS transfers, Mr. Bernstein foresaw no problem in handling shipments of effects in retirement cases as well. He noted that the language of FAM 168.1 also pertains to transfers and separation orders "when it is administratively determined that it is in the best interests of the Service."

3. Mr. Bernstein sees no problem in reimbursing a retiree after the effective date of his retirement for goods shipped at personal expense prior to retirement. Only an authorizing travel order would be required. He also believes that it would be possible to provide, under authority of a travel order, for the advance payment of transportation expenses to an employee who desires to move effects prior to the effective date of retirement, e.g. to an individual who leaves his post before the effective date of his retirement and enters a sick leave status immediately prior to becoming a disability retiree. He cautioned that the period between the authorization of transportation expenses and the agreed upon effective date of retirement should be a reasonable one and a repayment agreement similar to the one contained in FAM 168.1 should be obtained as a safeguard against the possibility of the approved retirement not occurring at the time stipulated.

4. It should be noted Mr. Bernstein's comments related to advance shipment of effects and did not involve the payment of advance travel costs. (Presumably, the same justification would apply.)



Deputy Chief
Plans and Analysis Division

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